LIBA

BASIC INFORMATION

Individuals (taxpayer, spouse and dependents, as applicable)

ID	Client # (internal use)	Name	DoB	Email	Phone	Occupation
T						
S						
D1						
D2						
D3						
D4						

Businesses, estates, trusts

ID	Client # (internal use)	Entity Name	Client Contact	Email	Phone	Entity Type	Year-End
B1							
B2							
B3							
B4							
B5							

ADDRESSES

ID	Street	Apt / Unit	City	State	Zip Code	Care Of	Primary or Secondary Residence?	Rental Property?
A1								
A2								
A3								
A4								
A5								

PREFERENCES AND OTHER INFO

Contact during the year:
- [ ] Once a month to check in
- [ ] Once a quarter for estimates
- [ ] Every six months to check in
- [ ] No set schedule, will reach out if needed

Method of contact:
- [ ] Email
- [ ] Call
- [ ] Text

Providing tax documents:
- [ ] In-person meeting
- [ ] Mail
- [ ] Portal

Client copy of returns:
- [ ] In-person pickup
- [ ] Mail
- [ ] Portal

Financial Advisor: ______________________

Attorney: ______________________